SHBP Enrollment Portal: ADP User Guide

Agencies Sending Automated Files & Data Sharing Tool

Rev. 07/15/2013

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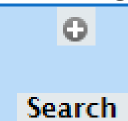
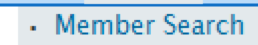
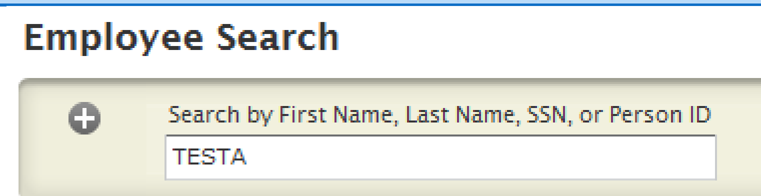
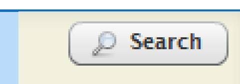
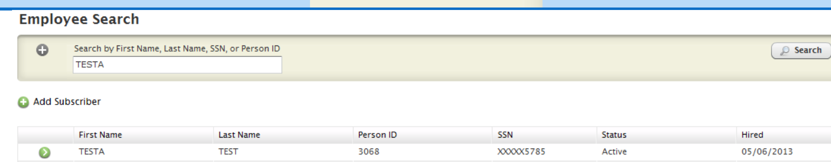
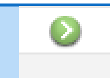
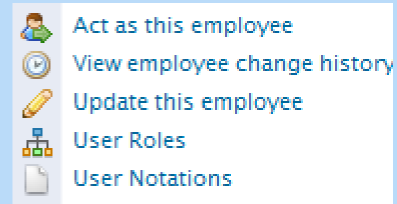
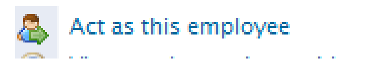
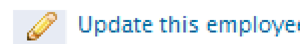
Note: Please ensure that you only have one instance of the SHBP Enrollment Portal site open at one time. Working on multiple instances will cause a system error.

Member Search

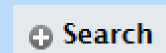
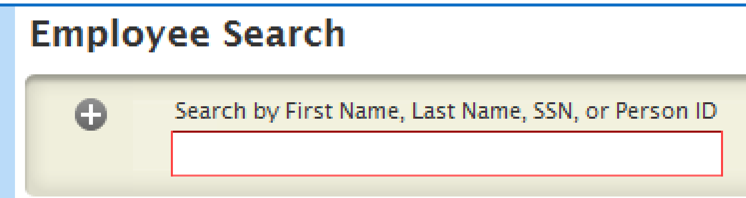
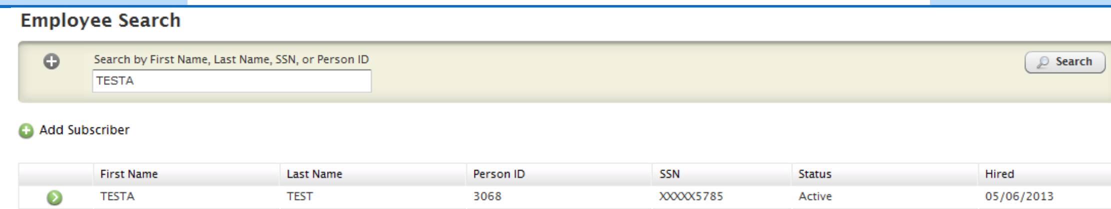
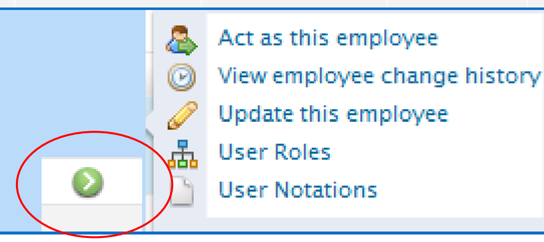
Member Search provides a brief overview on the function and types of searches that can be done in the system.
Note: Admins will only have access to the member population their security access has been set to.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **+** next to the **Search** button to expand.	
3	Choose **Member Search.**	
4	There are two types of search available: • **Basic Search** accepts a full or partial last name (using % as a multi-character wild card, as needed) or a complete Social Security Number (SSN). • **Advance Search** accepts full or partial first or last names as well as a complete SSN.	
5	Enter member criteria to search.	
6	Click **Search.**	
7	The search results will display. Please note: **Person ID** is an ADP assigned number only; no impact to SHBP.	

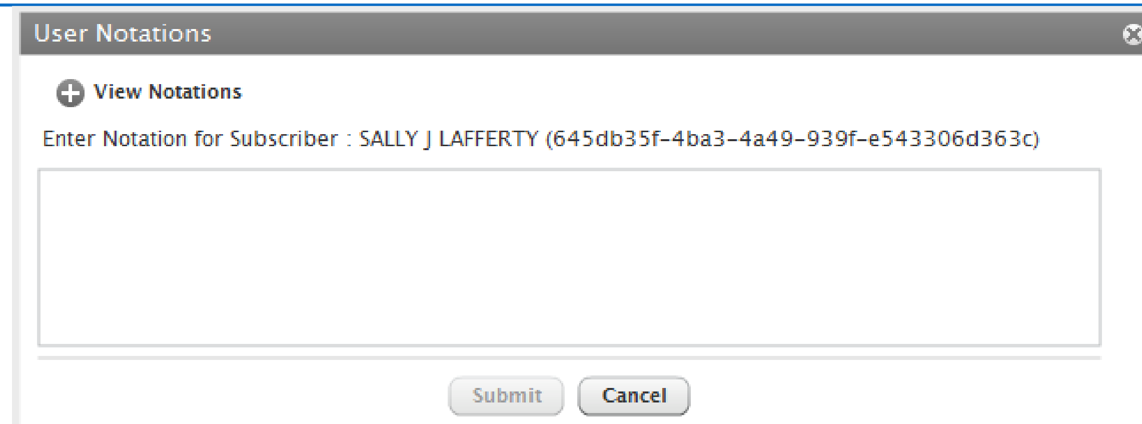
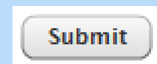
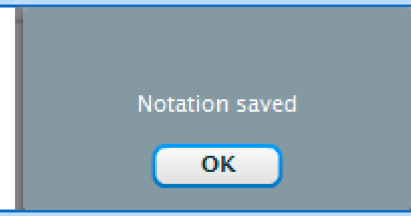
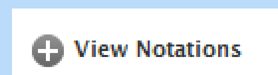
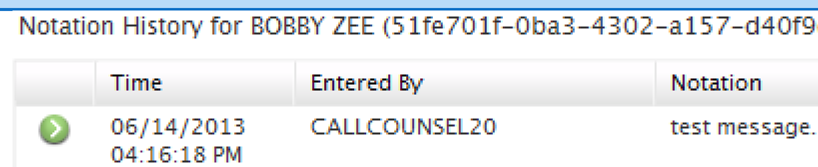
8	Click the green arrow, and several options will display. Note: **User Roles** feature will not be seen by all Admins.	 
9	**Act as this employee** returns you to the Welcome page with the notice that you are "Acting as <member name>". This enables you to: - Make elections on behalf of the member - Declare Life Events - Review **Current Enrollment** and **Employee Profile** screens	
10	**View employee change history** Navigates to the **Employee Profile** page, from which you can also view the **Summary** and **Timeline** pages for this member.	
11	**Update this employee** Navigates to the **Data Sharing Tool** which allows updates to add or edit member indicative data.	
12	**User Roles** Allows security access to be defined for Admins. Only certain SHBP Admins will have this access, although this may be a feature rolled out in the future to additional groups.	
13	**User Notations,** Allows an Admin to enter notes on a member's account.	

USER NOTATIONS

The **User Notations** feature allows an Administrator to enter notes on a member's account.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
7	The search results will display.	
8	Click the green arrow, and several options will display. Note: The **User Roles** feature will not be seen by all Admins.	

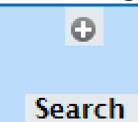
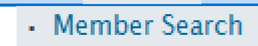
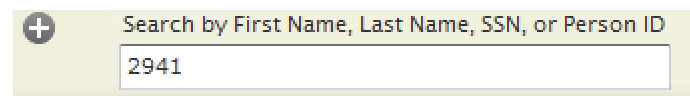
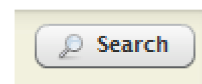
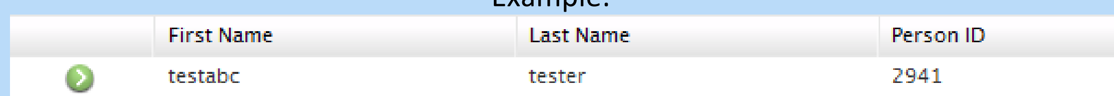
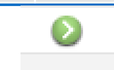
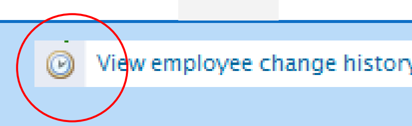
<table>
<tr><td>9</td><td>Choose User Notations, and enter the notes* desired for the member.

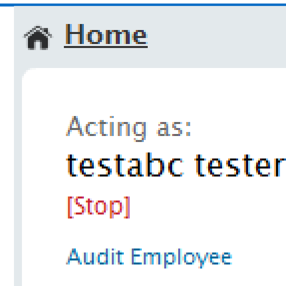
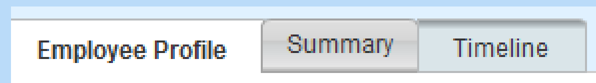
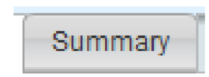
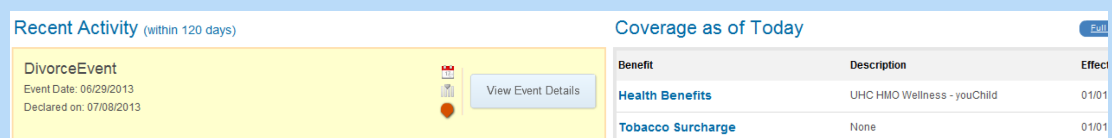
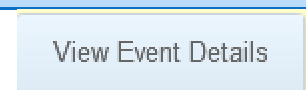
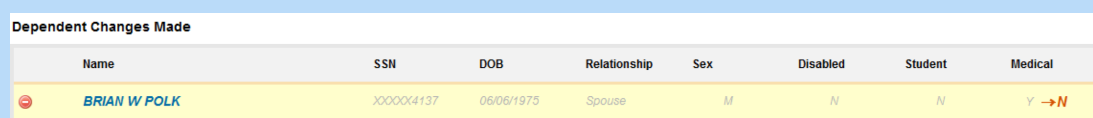
*4k Character limitation.</td><td>
</td></tr>
<tr><td>10</td><td>Choose Submit to save comments to the system.</td><td>
</td></tr>
<tr><td>11</td><td>Confirmation of saved notation will appear.</td><td>
</td></tr>
<tr><td>12</td><td>To view historical notes in the system, click View Notations, and expand the icon.</td><td>
</td></tr>
<tr><td>13</td><td>Previous notes will display.</td><td>
</td></tr>
</table>

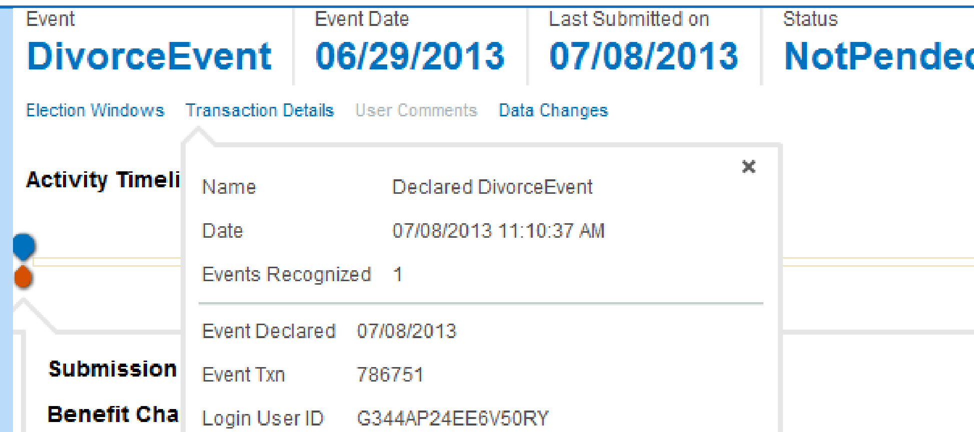
VIEW EMPLOYEE CHANGE HISTORY > AUDIT FEATURE

The **Audit Feature** navigates to the **Employee Profile** page, from which Administrators only also view the **Summary** and **Timeline** pages when acting as a member.

Critical: Only Admins can use **Audit** capabilities.

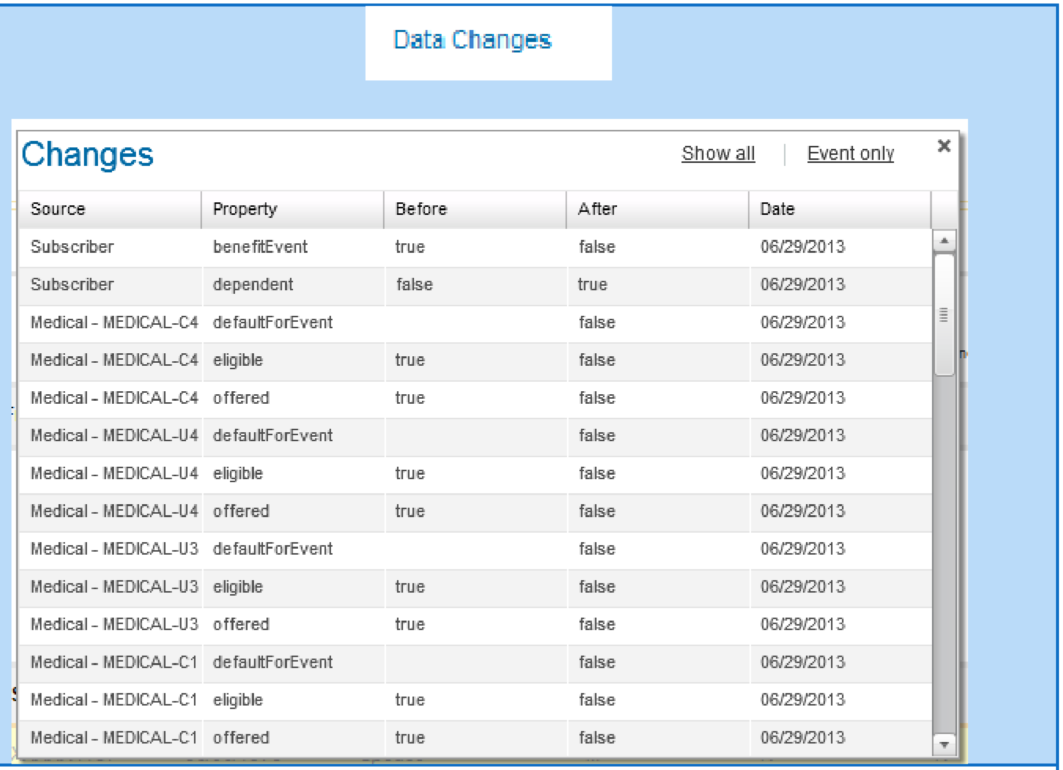
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **+** next to the **Search** button to expand.	
3	Choose **Member Search**, and enter the member criteria that you want to review. Click **Search**.	 Example:  
4	Search results will display.	Example: 
5	Click the green arrow.	
6	Choose Option 1 to **View employee change history**. Click the clock icon, or	

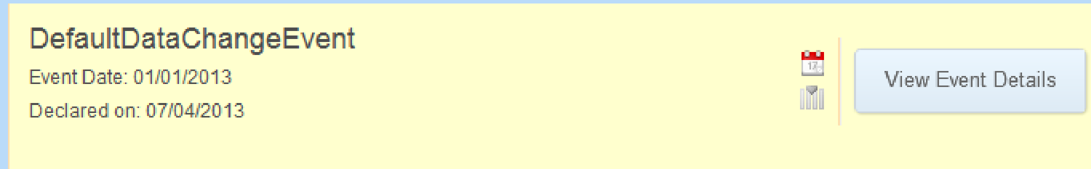
7	Choose Option 2 to **View employee change history/Audit** On left hand side of the screen, choose **Audit Employee**.	
8	Regardless of what option is chosen, the first page that displays is **Employee Profile**. This will house all of the employee demographic information Note: The **Employee Profile** is also available to the member from the right-hand navigation bar.	
9	Click the **Summary** tab.	
10	The **Summary** tab lists recent activity on the left and current benefits and effective dates for the selected member and dependents on the right.	
11	Click **View Event Details**.	
12	The **View Event Details** page opens a new page, and drills down to information about the benefit elections related to the event. (e.g., what the member changed *from* and then changed *to*)	

13	This page shows all user activity (changes) related to the selected event, even if the user did not complete a benefit election. The colored icons represent the following: *Red icon* — Refers to the number of sessions recorded in the web application, whether or not the election was submitted. *Blue icon* — Refers to activity recorded and then election submitted. This page also includes **Data Changes,** which shows what benefits were changed by this event, with the change indicated in Before and After columns. *Calendar* – Will take the Admin to the Timeline feature in the Audit screen.	
14	**Transaction Details** shows what caused the change, such as an event or a file load.	

15	**Session Details** Shows the amount of time a member is online for specific Qualifying Events. **Session Activity**: Confirmed means the member saved their elections. **Session Activity**: Canceled without saving means the member went online in an existing/open Qualifying event and did not save the changes after entering the event. **HR Admin** - This will show who processed the enrollment. Call Counselor will be the ADP team. If the actual SHBP ADMIN that made the election it will list the HR Admin's name. Note: When an employee processes their OWN elections the HR Admin will not show in the audit history.	

<table>
<tr>
<td>16</td>
<td>Data Changes shows what benefits were changed by this event, with the change indicated in Before and After Columns.

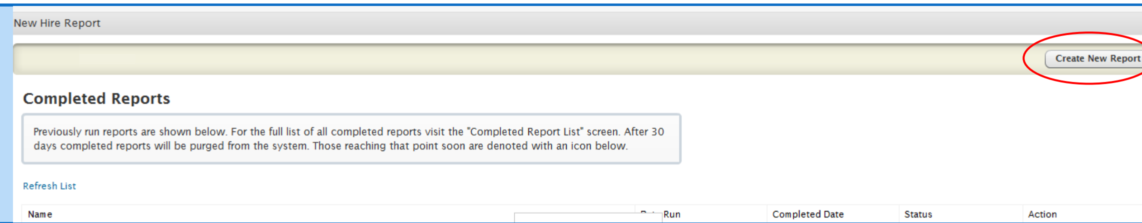
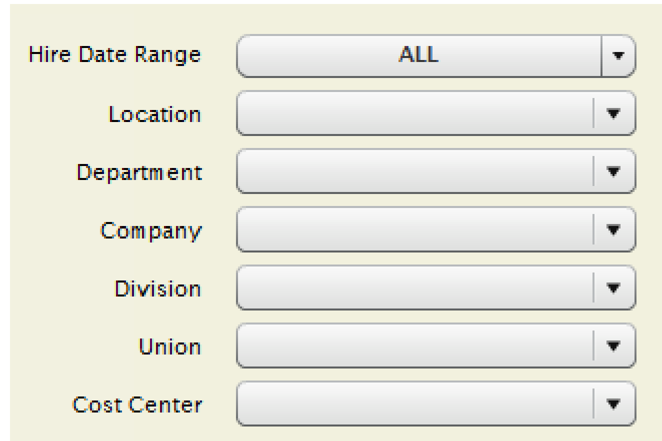
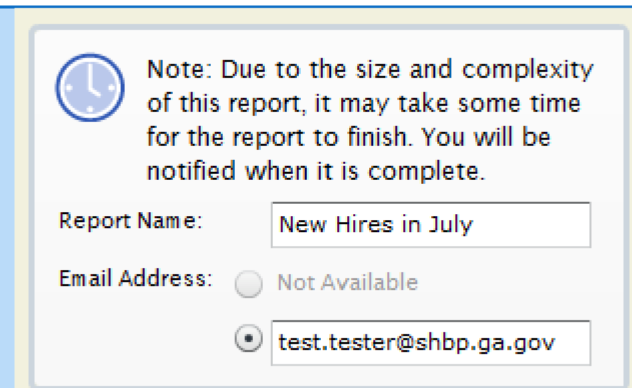
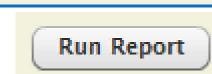
Click Data Changes.
This will enable an Admin to review quickly the before and after of the specific event saved.</td>
<td>
</td>
</tr>
<tr>
<td>17</td>
<td>The Timeline tab shows coverages as yellow bars, with the overall time determined by how the blue timeline is set at the top. The yellow bars are divided into sections if coverages changed. Clicking a section of yellow line displays the coverage details for the period of time defined by the narrow white lines dividing the yellow bar. The coverages displayed depend on what was checked to the right of Coverage Timeline as of <date> in the Summary tab.</td>
<td>
</td>
</tr>
</table>

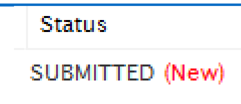
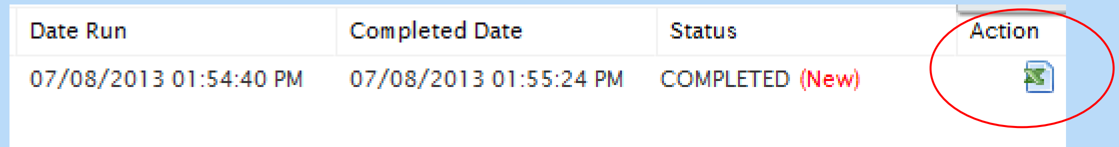
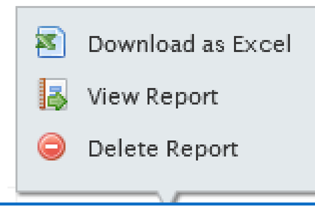
18	**Note:** Summary Tab > Default Data Event This event encompasses items that are not defined by specific qualifying events (i.e. Birth, Marriage) but are sent to ADP via the normal Input file or use of Data Sharing Too. Examples of items that do not fall into a Qualifying Event. I.e. Email change, Name Change. Utilize the Data Changes screen to view what changed on the account.	

REPORTS

An Admin user with the appropriate security access will be able to run reports and view completed reports that they generated; the user cannot see reports generated by other users.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	On the Home page, click **+** next to **Reports**.	Home Reports
3	List of available reports will display.	Reports New Hire Employees Benefit Enrollment Dependent Age Out Census Plan Migration Benefit Summary Enrollment Statistics Create Report Report Management
4	To create a new report click on the name of the report and then choose "Create New Report". Screen shot is example.	New Hire Employees

		
5	Use the drop down boxes for the information that you would like to search; each report will have specific criteria. Critical: HR ADMINS should use the Cost Center to pull their specific Agency Reports. Note: The HR Admin running the report will only see Cost Centers that they have security access to. However all Locations will list; but reports generate based on the security of the Cost Center.	
6	Put in the name of the report you would like to generate and enter an email in the next box.* *If you have an email on file it will auto-generate. An email will be sent once the report is completed.	
7	Click On "**Run Report**". Status of the report will show at the bottom	

	of the screen.	
8	**Viewing Reports**: The system will send an email once the report is generated. Access the OBA system and go back to the report that was just ran. Final report will show under the Action Column.	
9	The report can be exported into excel or it can be viewable on the web or if need be can be deleted.	

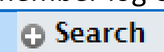
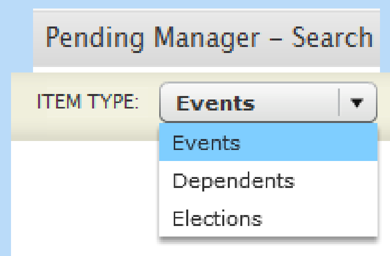
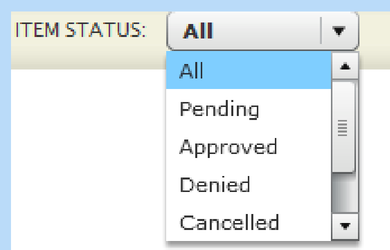
Pending Manager

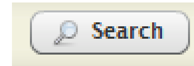
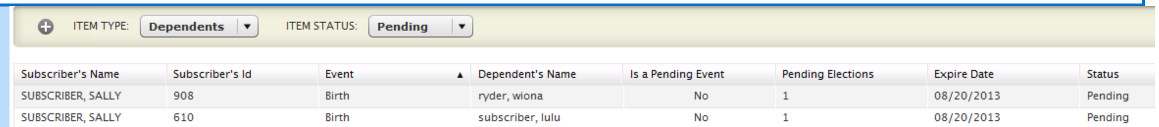
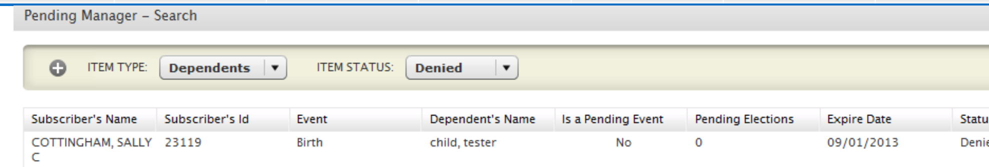
HR Admin users can use Pending Manager search to do the following:

- Search based on status: Pending, Approved, Denied, Cancelled (or all for the selected pending type)
- Search based on specific member
- View details of the actions in Pending status
- Approve, deny, extend, or make notes about the pending action

From **HR Tools**, you can search for any pending activity based on selection parameters and then act on the pending activity.

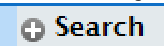
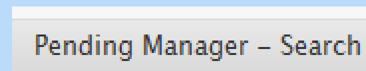
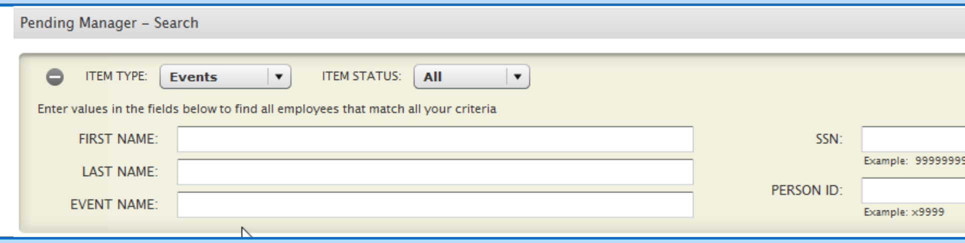
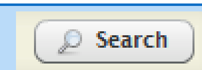
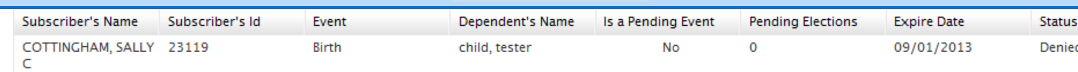
Searching for Pending Activity via Status

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Select **Pending Manager** in the drop down box.	
4	An HR Admin user can use **Pending Manager** to search for pending activity based on the following: • **Item Type** of Event, Dependents, or Elections. • **Item Status** of All, Pending, Approved, Denied, Cancelled, Expired, or Ineligible. As with **Member Search**, **Pending Manager** provides both basic and advanced search capabilities including search by subscriber name, SSN, and Person ID, as well as by event name. **Note: Election Type** does not apply to SHBP. **Events** and **Dependents** do.	 

5	After choosing the **Item Status**, select **Search**.	
6	This is an example of **Pending Status**.	
7	This is an example of **Denied Status**.	

PENDING MANAGER

SEARCHING FOR PENDING ACTIVITY VIA A SPECIFIC MEMBER

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Select **Pending Manager** in the drop down box.	
4	At the **Pending Manger- Search** screen, choose  .	
5	This opens a screen for you to enter specific search criteria:	
6	After entering the data elements, (i.e. member first and last name), click **Search**.	
7	Search result display on next screen.	

EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEE > AGENCIES USING DATA SHARING TOOL

(I.e. Address, spelling of member name, gender --- <u>For Agencies with access to Data Sharing Tool*</u>

This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, address, SSN changes) for an active or retired member. There may be Admins who can READ the Data Sharing Tool, but will not have WRITE or access to update member data.

Note: Retirees are able to update their address on their OWN after logging onto the ADP System.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	Employee Search Search by First Name, Last Name, SSN, or Person ID
5	Choose **Update this employee**.	Update this employee
6	On the **Update Subscriber** screen, choose **Personal**.	Personal
7	Enter the effective date into system using the calendar feature icon. **Note:** The date cannot be prior to 1/1/13.	Personal Information Show/Update information as of: 05/29/2013
8	Click **Submit** to have changes sent to the SHBP Enrollment Portal. **Critical**: If there is more than ONE change to indicative data, each item has to be submitted separately. I.e. Name change and Address change would have to be submitted	Submit

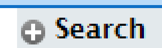
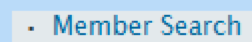
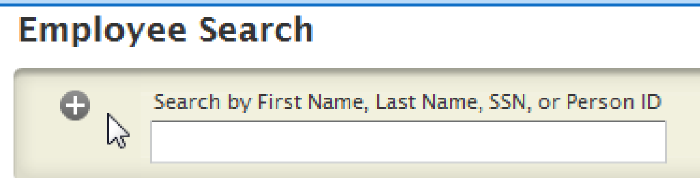
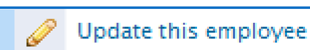
	separately. **Note:** Review all changes prior to submission in order to ensure the accuracy of data entry.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Update on SHBP Enrollment Portal is immediate.	

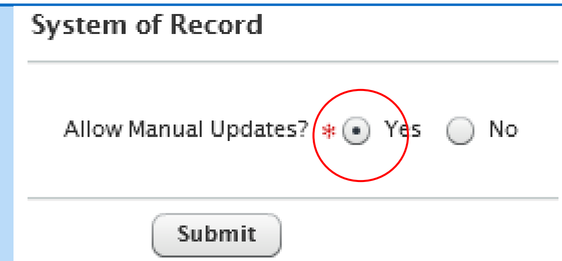
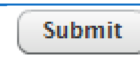
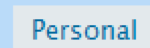
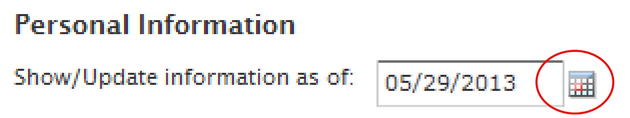
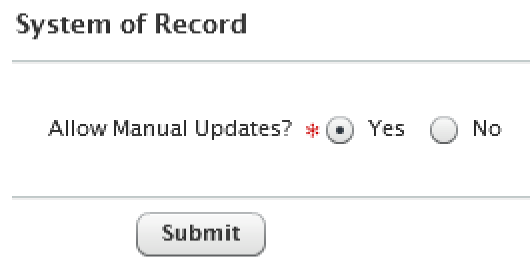
EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEES > FOR AGENCIES USING AUTOMATED FILES.

Allows **users with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, address, Social Security Number (SSN) changes) for an active or retired member. **(CRITICAL: Only SHBP Admin User or SHBP IT User)**

Note:

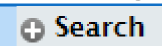
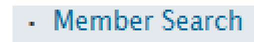
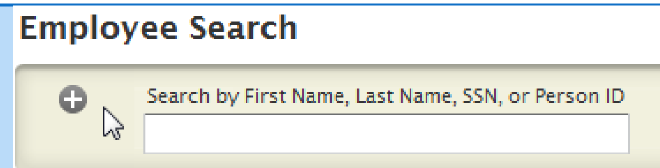
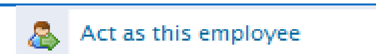
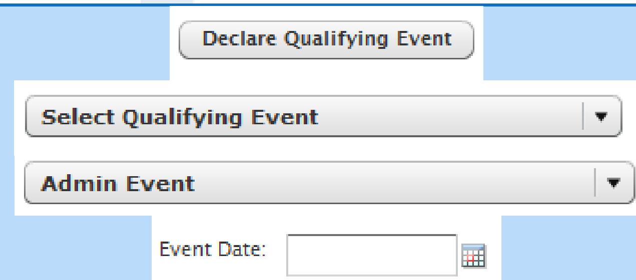
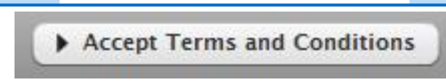
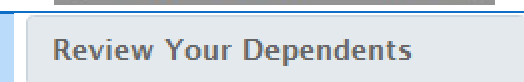
- *Agencies who send automated files should continue to make changes via automated files that they do today.*
- *There may be Admins who can READ the Data Sharing Tool, but cannot WRITE or access to update member data.*
- *Retirees are able to update their address on their OWN after logging onto the ADP System.*

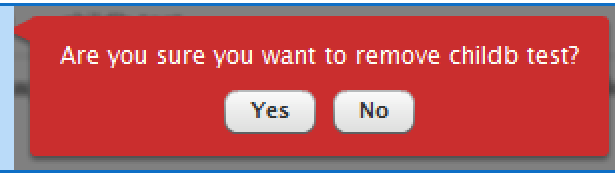
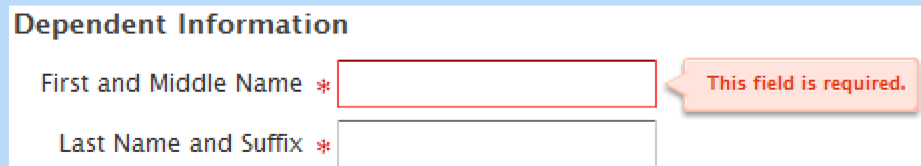
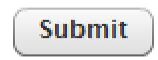
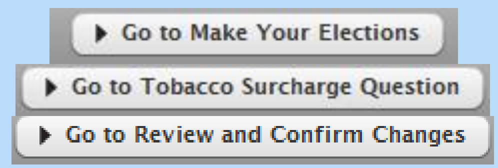
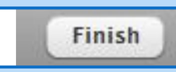
Steps	Process Flow Instructions	Screen Shot
1	Refer agency to follow the normal file process to update member indicative data.	
2	If Data Sharing Tool is the chosen method to update a member's record, log on to the SHBP Enrollment Portal.	
3	Click **Search**.	
4	Choose **Member Search** from the drop down box.	
5	Enter the appropriate member details.	
6	Choose **Update the employee**.	
7	On the left-hand navigation bar, choose **System of Record**.	

8	Since the Data Sharing Tool is not the system of record, click **Yes**. This will enable the record to be updated via the Data Sharing Tool.	
9	Choose **Submit**.	
10	On the **Update Subscriber** screen, choose **Personal**.	
11	Enter in appropriate effective date into system using the calendar feature icon. **Note:** The date cannot be prior to 1/1/13.	
12	The HR Admin making the update must inform the local Agency to update their normal system of records. **CRITICAL: If this is not updated, the data changes will be undone.**	
13	Go back to the **System of Record** and choose **No** to relock the account. Choose **Submit**. This will set the **System of Record** back to be 'not manual'.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Update on SHBP Enrollment Portal is immediate.	

DEPENDENT INDICATIVE DATA CHANGE

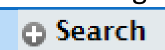
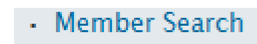
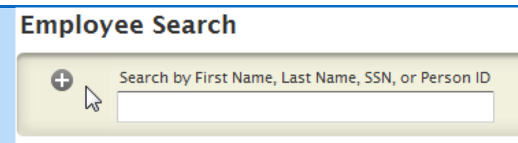
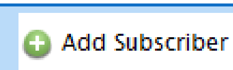
This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, SSN changes) on a dependent.

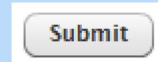
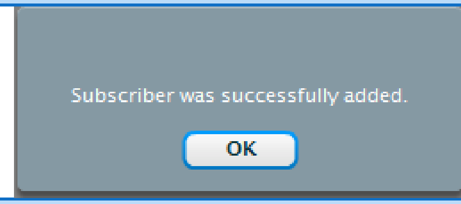
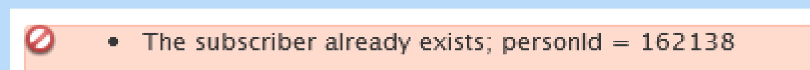
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Choose **Act as this employee**.	
6	**Declare Qualifying Event** as an **Admin Event** and enter in the appropriate **Event Date**. **Note:** If Admin Event is used to make corrections, the dependent will not pend.	
7	On the **Welcome** page, click **Accept Terms and Conditions**.	
8	On the **Review Your Information** page, click **Review Your Dependents**.	
9	Select the red circle next to the dependent that requires the indicative data update. This will remove the dependent from the record.	

10	Click **Yes** to confirm the dependent should be removed.	
11	Next, add the dependent back into the system with the appropriate details by clicking **Add a Dependent**.	
12	The **Add Dependent Information** screen displays with required fields noted. Verify data entry as complete.	
13	Click **Submit** at the bottom of the screen.	
14	Move through the following screens and confirm changes. **Note:** Do not make enrollment changes to medical unless needed.	
15	Complete the enrollment by clicking **Finish**.	
	ADP email communication: No ADP email communication.	

DATA SHARING TOOL > DATA SHARING TOOL > ADD SUBSCRIBER/NEW HIRE DATA ENTRY

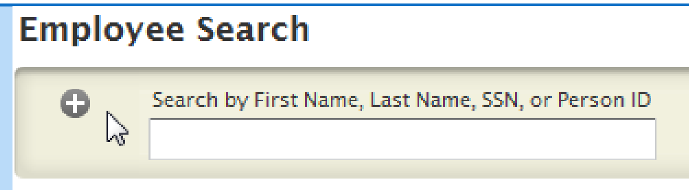
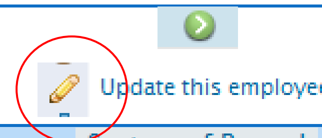
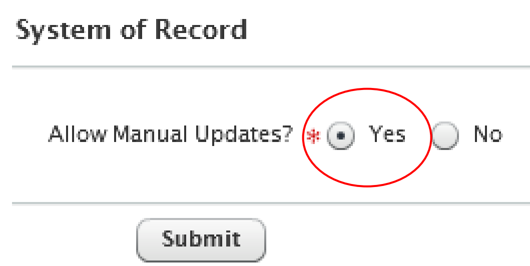
This allows a user with appropriate security level access to enter a new hire directly into the ADP system as opposed to updating the data through an input file. The only type of member that should be entered is an ACTIVE member (no contractors, not retirees).

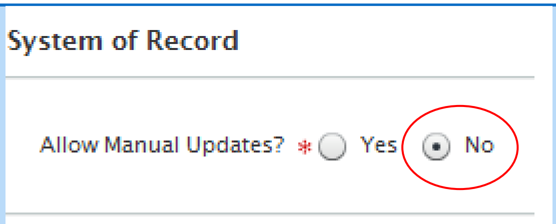
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Search for the member to ensure their employment data is not already in the SHBP Enrollment Portal Site.	
6	If member is not within the system, click **Add Subscriber**.	
7	The **Add Subscriber** page displays. Enter any field that has an asterisk next to it. <u>These are required fields</u>. If not entered, the record creation of the member record will fail. **Note:** • Depending on the field type, select text from a drop down list or select from the data picker. • Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure accuracy of data entry.	Example: 

	• If at all possible, enter an email address for the member. This will ensure the new member notified with a "New Enrollment" notification email.	
8	After all required fields are entered, click: **Submit**.	
9	Confirmation of the newly added member appears.	
10	**Note:** An Admin may do a search and not see an existing record on file due to visibility restrictions. If you try to add a member that already exists, an error message will occur. This means the member is in the SHBP Enrollment Portal already; however you do not have access to the member's playgroup. **NEXT STEP**: Contact SHBP DCH team to coordinate access and the transfer.	
11	**System Timing**: After confirmation that the member was added, the member can log in online, register and make their enrollments.	
	ADP email communication: New Hire Window email will be sent if email address is on file.	
	ADP file frequency: Files sent daily to SHBP.	

Data Sharing Tool > Data Sharing Tool > System of Record

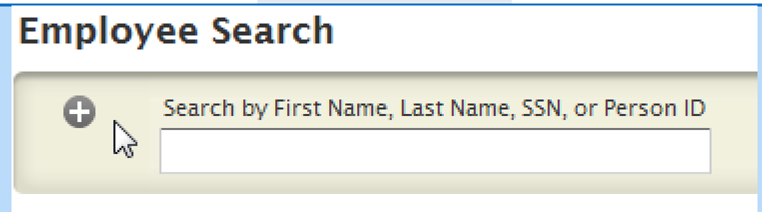
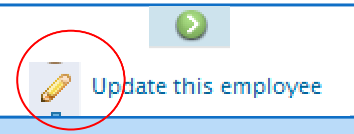
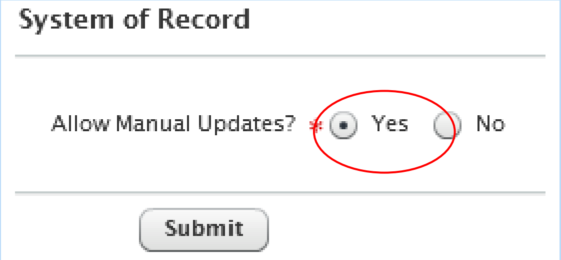
This allows an Admin the ability to update a member record via the Data Sharing Tool.

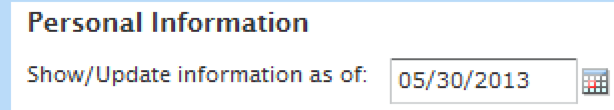
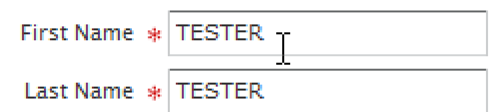
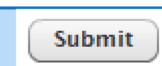
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to **Update this employee**.	
6	Click **System of Record**.	System of Record
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	

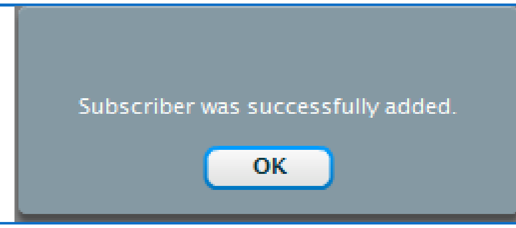
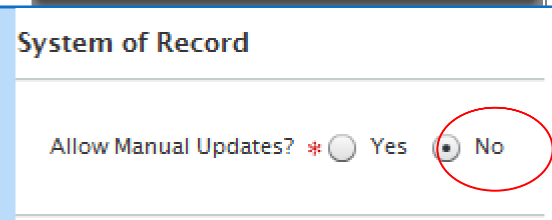
8	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	

DATA SHARING TOOL > PERSONAL

This allows a user with an appropriate security level access to update certain indicative data for members: (i.e., first and last name, gender etc)

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	· Member Search
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to **Update this employee**.	
6	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten..	
7	The **Update Subscriber** page displays. Under Tasks, choose **Personal**.	Tasks Personal

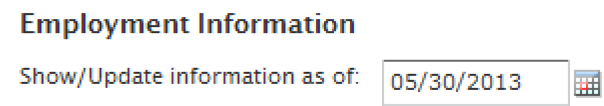
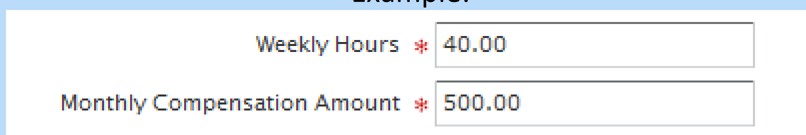
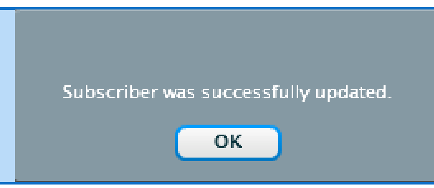
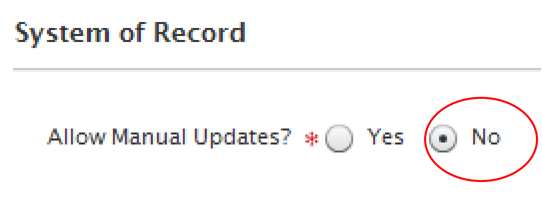
8	Enter the effective date of the change. **Note:** Typically, this is the date of hire or date of marriage, for example.	
9	Update the desired personal indicative data changes. **Grandfather Question must be answered**. The definition of Grandfather means that a member is 'automatically' benefits eligible, and does not look at DOH or location to determine eligibility. **Note:** • Depending on the field type, select text from a drop down list or select from the data picker. • Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure the accuracy of data entry. **Critical**: If there is more than ONE change to indicative data, each item has to be submitted separately. I.e. Name change and Address change would have to be submitted separately.	Example:  
10	After all required fields are entered click:, **Submit**.	

11	Confirmation of changes added displays.	
12	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the member can log in online and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > EMPLOYMENT

This allows a user with appropriate security level access to update specific employment data for members: (i.e., employment status, scheduled hours, hire date, compensation and Payroll Location)

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	Employee Search Search by First Name, Last Name, SSN, or Person ID
5	Next to **Member Name**, click the green arrow, and choose the 'pencil' to **Update this employee**.	Update this employee
6	Click **System of Record**.	System of Record
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	System of Record Allow Manual Updates? * Yes No Submit
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Employment**.	Tasks Employment

9	Enter the effective date of the change. **Note:** Typically this is the date of hire or date of marriage, for example.	
10	Update the desired employment data changes. • Weekly compensation • Hours • Premium Type for Retirees **Note:** • Depending on the field type, select text from a drop down list or select from the data picker. • Hire Date and Original Hire Date functionality may be revised; these items will only be visible.	Example: 
11	After all required fields are entered, click: **Submit**.	
12	Confirmation of changes added displays.	
13	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	

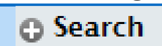
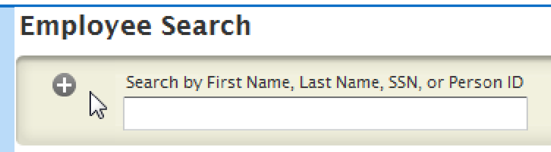
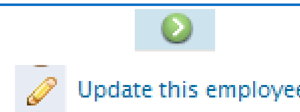
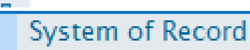
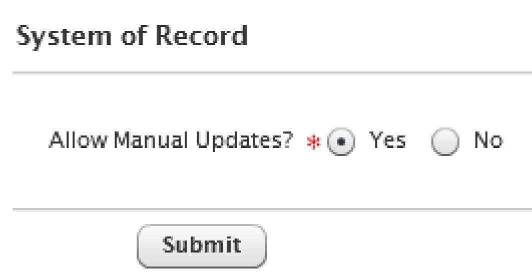
	System Timing: After confirmation that the change was added, the member can log in online and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

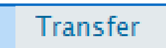
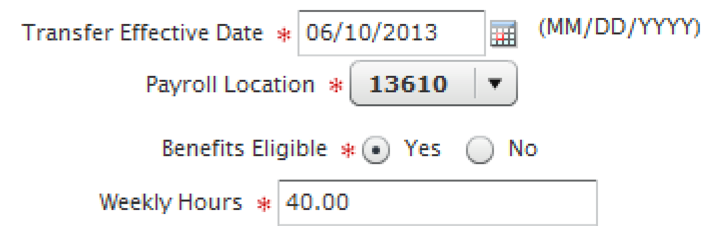
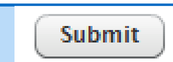
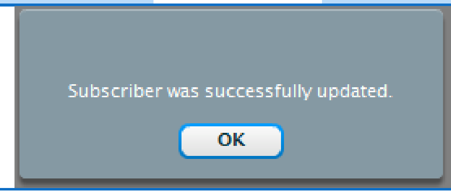
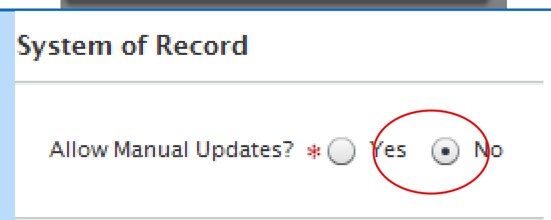
DATA SHARING TOOL > TRANSFER

This event will be utilized by SHBP Admins with the appropriate access to update a member's record if they are part of a transfer to a new agency/Payroll Location.

Note:

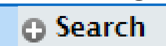
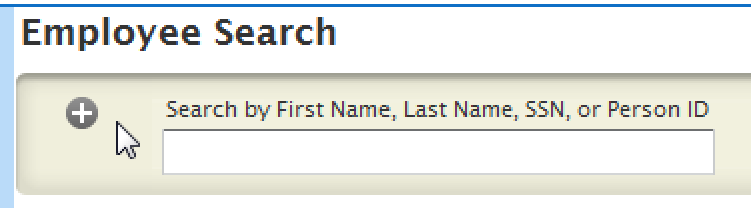
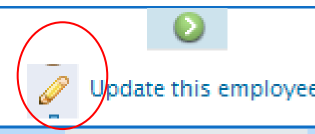
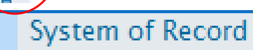
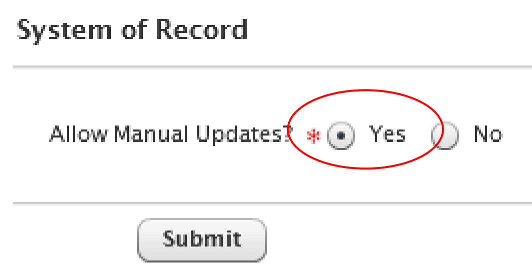
- *Agency Admins will only be able to process transfers on members they have security access to see. Due to the security restriction, most of the use of transfer function could be from the SHBP Staff.*
- *If the member's hire date is greater than the previous hire date, and the agency sends a file, the Data Sharing Tool should not be used.*

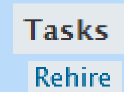
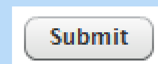
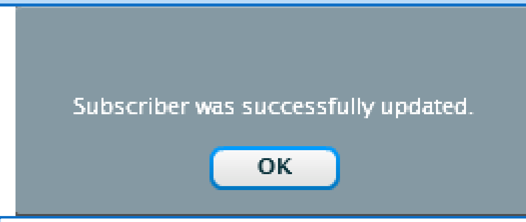
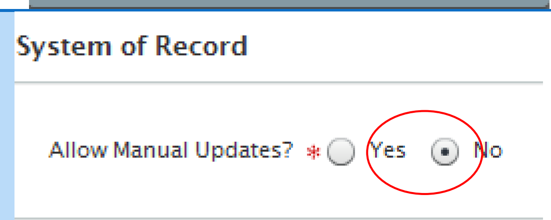
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to update this employee.	
6	Click **System of Record**.	
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	

8	Click **Transfer**.	
9	The following fields must be updated: • Effective Date (as date of the transfer) • Payroll Location (verify accuracy) • Benefits Eligible • Weekly Hours **Note:** The transfer effective date is the date the member joined the new Payroll Location/ Agency.	
10	Once complete, click **Submit**.	
11	Confirmation of the save displays.	
12	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the system will recalculate benefits and rates. The member can log in online, and view the changes immediately.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

Data Sharing Tool > Rehire

This allows a user with appropriate security level access to update specific Rehire data for Members.

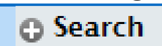
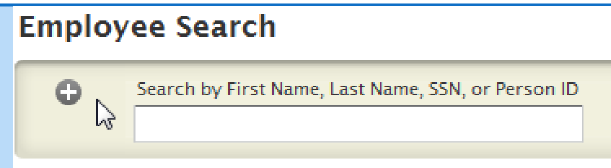
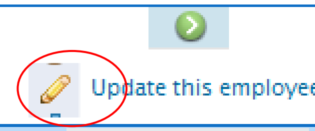
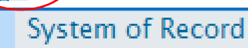
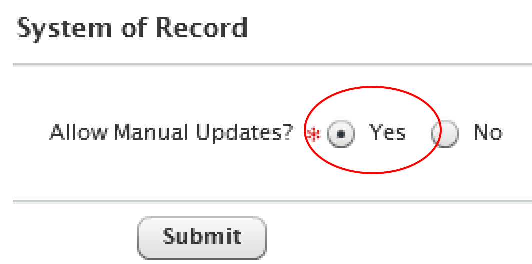
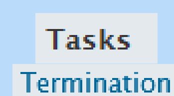
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to **Update this employee**.	
6	Click **System of Record**.	
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	

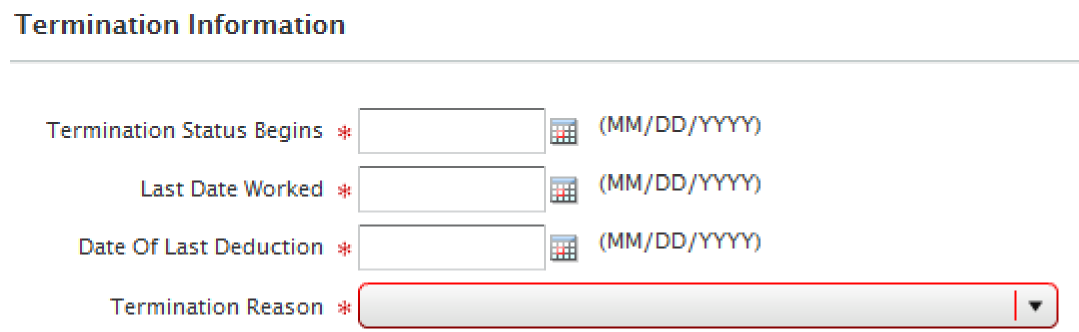
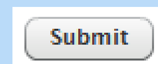
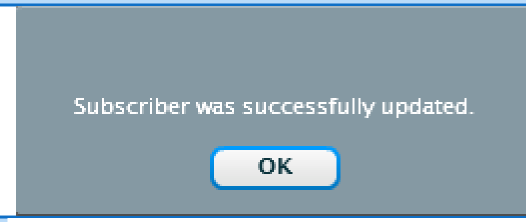
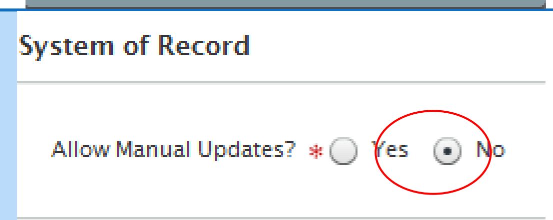
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Rehire**.	
9	On the Rehire Information screen, enter the rehire date in the **Adjusted Hire Date** field.	
11	After all required fields are entered, click **Submit**.	
12	Confirmation of the changes added displays.	
13	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the member can log online, and view the changes.	
	ADP email communication: If the member is hired within 31 days and has an email address on file, the New Hire email will be sent.	

	ADP file frequency: Files sent daily to SHBP.	

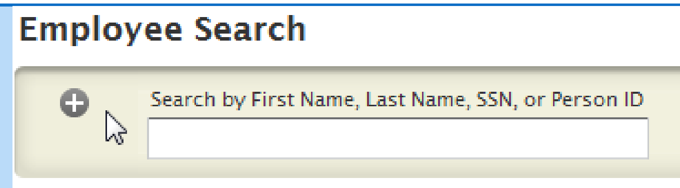
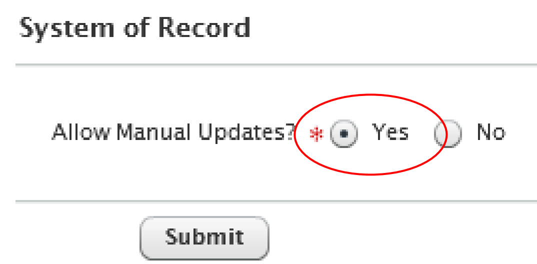
DATA SHARING TOOL > TERMINATION

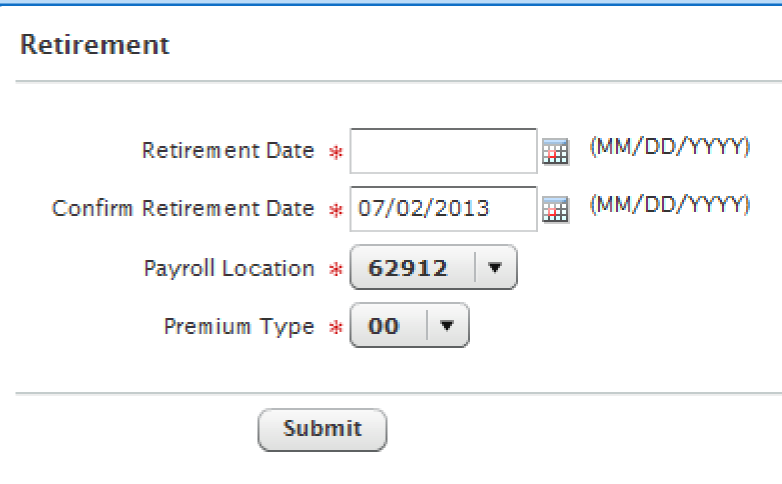
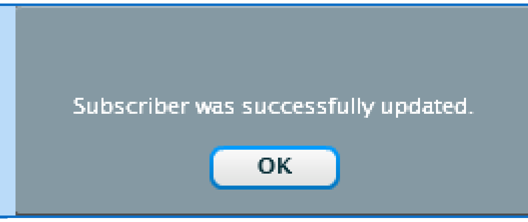
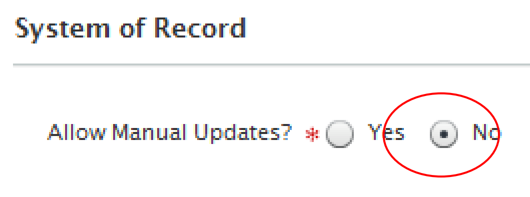
This allows a user with an appropriate security level access to update specific termination data for members.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the 'pencil' to update this employee.	
6	Click **System of Record**.	
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Termination**.	

9	On the Termination Information screen, enter the Termination date and the coverage end date. Select the **Termination Reason** from the drop down box. Term Date = the first day no longer employed. Last day worked = Last day working **Note:** A voluntary piece will be added and defaulted to YES.	
11	After all required fields are entered, click: **Submit**.	
12	Confirmation of changes added displays.	
13	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the Admin can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

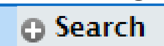
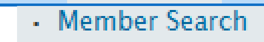
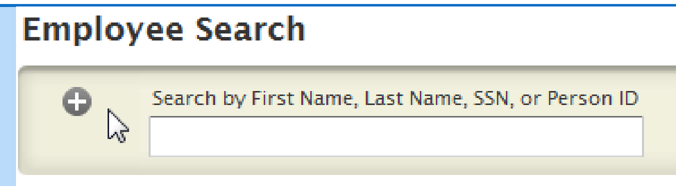
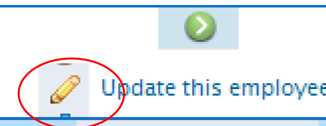
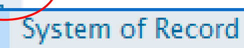
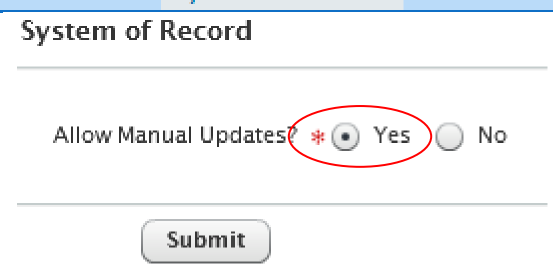
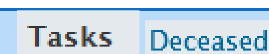
DATA SHARING TOOL > RETIREMENT

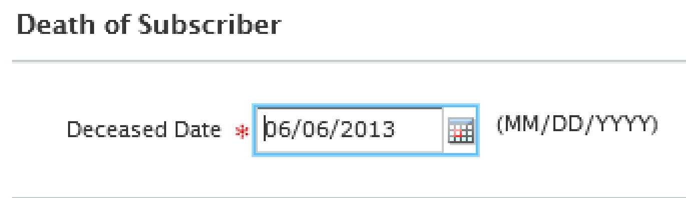
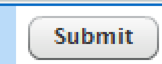
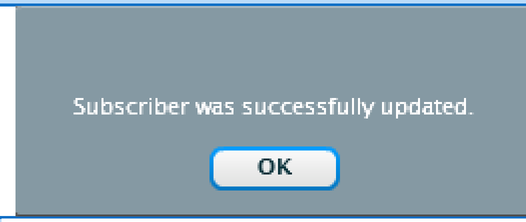
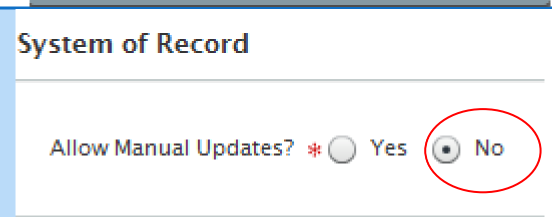
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the ‘pencil’ to **Update this employee**.	Update this employee
6	Click **System of Record**.	System of Record
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Retirement**.	Tasks Retirement

9	Update all required fields (notated by the asterisk) on the **Retirement** page. Update Payroll Location and Premium type to appropriate Retiree data points.	
10	Confirmation of changes added displays.	
11	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	ADP email communication: New Retiree email is sent if email address is on file.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > DECEASED

This allows a user with appropriate security level access to update specific death data for members.

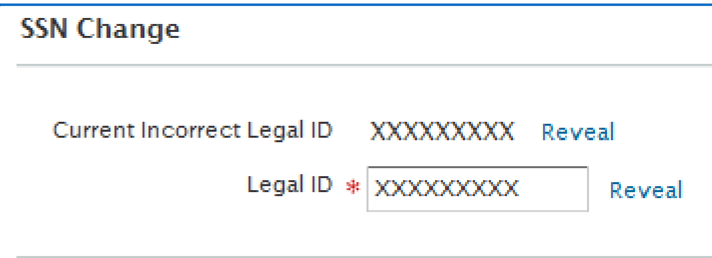
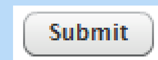
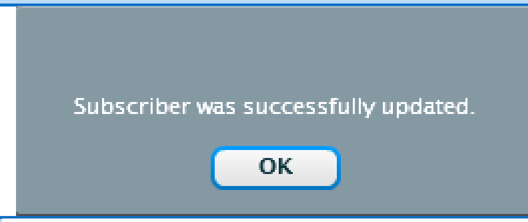
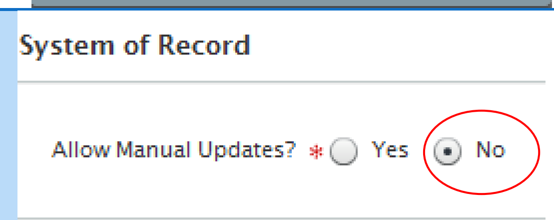
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the 'pencil' to **Update this employee**.	
6	Click **System of Record**.	
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Deceased**.	

9	Enter the date of death for the subscriber.	
11	After all required fields are entered, click: **Submit**.	
12	Confirmation of changes added displays.	
13	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the Admin can log in online, and view that the status of the member is now deceased.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > SSN CHANGE

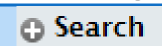
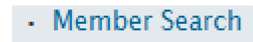
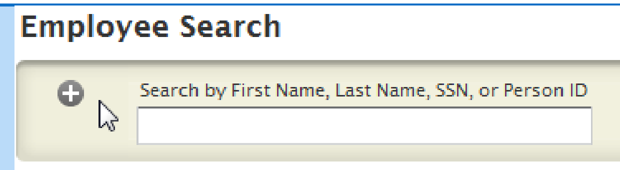
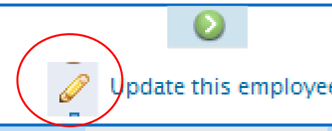
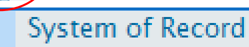
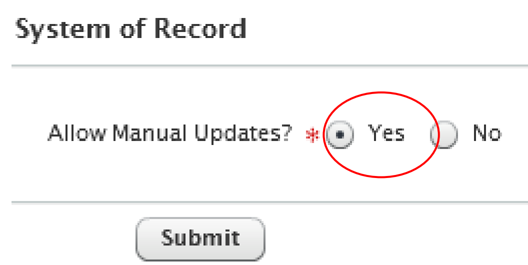
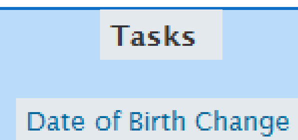
This allows a user with an appropriate security level access to update a member's SSN.

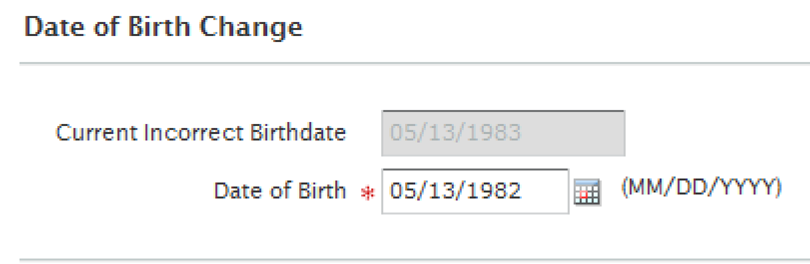
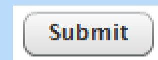
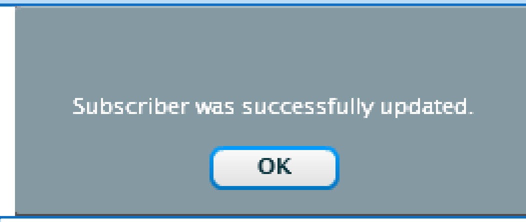
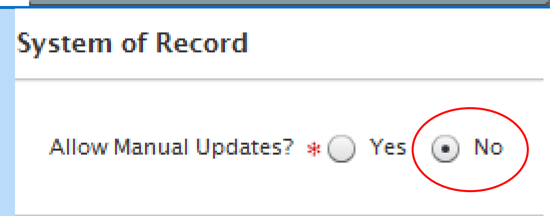
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	Employee Search Search by First Name, Last Name, SSN, or Person ID
5	Next to Member Name, click the green arrow, and choose the 'pencil' to **Update this employee**.	Update this employee
6	The **Update Subscriber** page displays. Under **Tasks**, Click **System of Record**.	Tasks System of Record
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	System of Record Allow Manual Updates? * Yes No Submit
8	Under **Tasks**, Click **SSN Change**	Tasks SSN Change

9	Use the **Reveal** feature to confirm the Incorrect SSN in the system. Enter in the correct SSN **(Legal ID)**.	
10	Verify new SSN submitted is accurate and then choose **Submit**	
11	Confirmation of change added displays.	
12	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the member can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > DATE OF BIRTH CHANGE.

This allows a user with an appropriate security level access to update date of birth for a member.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	
3	Choose **Member Search** from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to **Update this employee**.	
6	Click **System of Record**.	
7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	
8	Under **Tasks**, Click **Date of Birth Change**	

9	Enter in the correct Date of Birth.	
10	Verify new Date of Birth submitted is accurate and then choose **Submit**	
11	Confirmation of change added displays.	
12	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the member can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

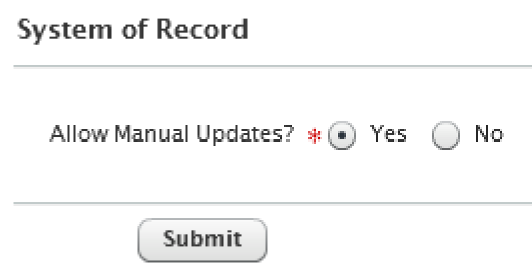
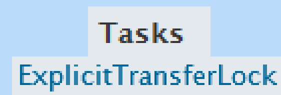
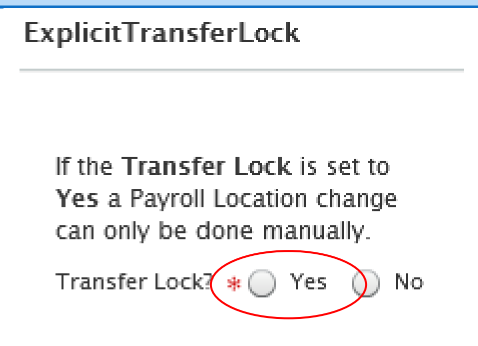
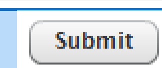
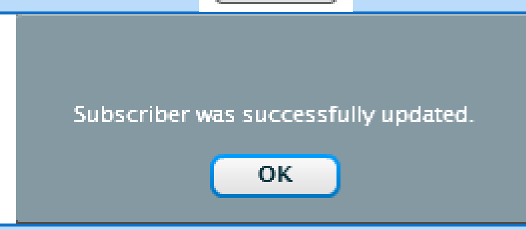
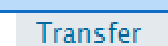
DATA SHARING TOOL > EXPLICIT TRANSFER LOCK

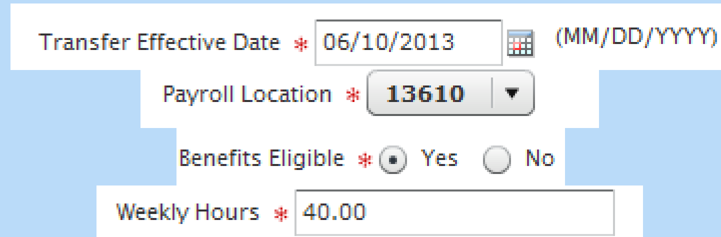
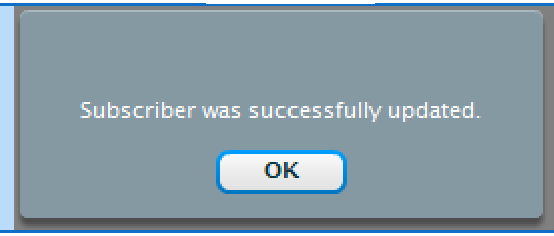
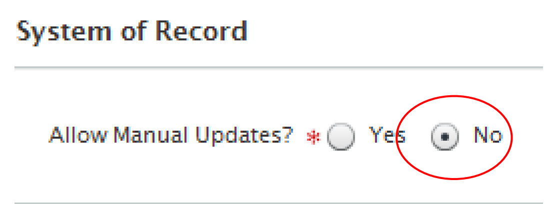
This function will be used only when SHBP needs to explicitly change the Payroll Location of a member. Most changes will be handled by the automated files but there will be instances where this function is needed. For security reasons, Agency Admins will only have access to the members who are currently in their Payroll Location. The explicit transfer function will only be used by the SHBP Staff when this location needs to be manually changed, such as in the case of dual employment, or when one agency doesn't send a timely termination, and the member is hired by another agency.

Example:

Test Member is a member at X Agency, and gets a second job at Y Agency. Test Member is currently enrolled in benefits/rates with X Agency. Test Member would like to keep benefits with X Agency and not go on Y Agency benefits. Test Member notifies HR or ADP who will contact the SHBP Staff with the request.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click **Search**.	Search
3	Choose **Member Search** from the drop down box.	Member Search
4	Enter the appropriate member details.	Employee Search Search by First Name, Last Name, SSN, or Person ID
5	Next to Member Name, click the green arrow, and click the 'pencil' to **Update this employee**.	Update this employee
6	Click **System of Record**.	System of Record

7	**System of Record** must be listed as **Yes** in order for the account to be updated via the Data Sharing Tool. **Note:** If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	
8	The **Update Subscriber** page displays. Under **Tasks**, choose **Explicit Transfer Lock**.	
9	At the prompt, choose **Yes** to lock the account.	
11	Click **Submit**.	
12	Confirmation of changes added displays.	
13	Go to **Transfer** task.	
14	Click **Transfer**.	

15	The following fields must be updated: • Effective Date (as date of the transfer) • Payroll Location (verify accuracy) • Benefits Eligible • Weekly Hours **Note:** The **Transfer Effective Date** is the date the member joined the new Payroll Location/ Agency.	
16	Once complete, click **Submit**.	
17	Confirmation of the save displays.	
18	After making changes in the Data Sharing Tool, go back to **System of Record**, and click **No** to ensure record is locked. This will set the **System of Record** back to '**No**'.	
	System Timing: After confirmation that the change was added, the member can log in online, and view the changes immediately.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > LEAVE OF ABSENCE

Leave of Absence is not managed in the Data Sharing Tool or SHBP Enrollment Portal. S HBP Enrollment Portal will never reflect a member on a Leave of Absence status.